Connector Flexmail Salesforce

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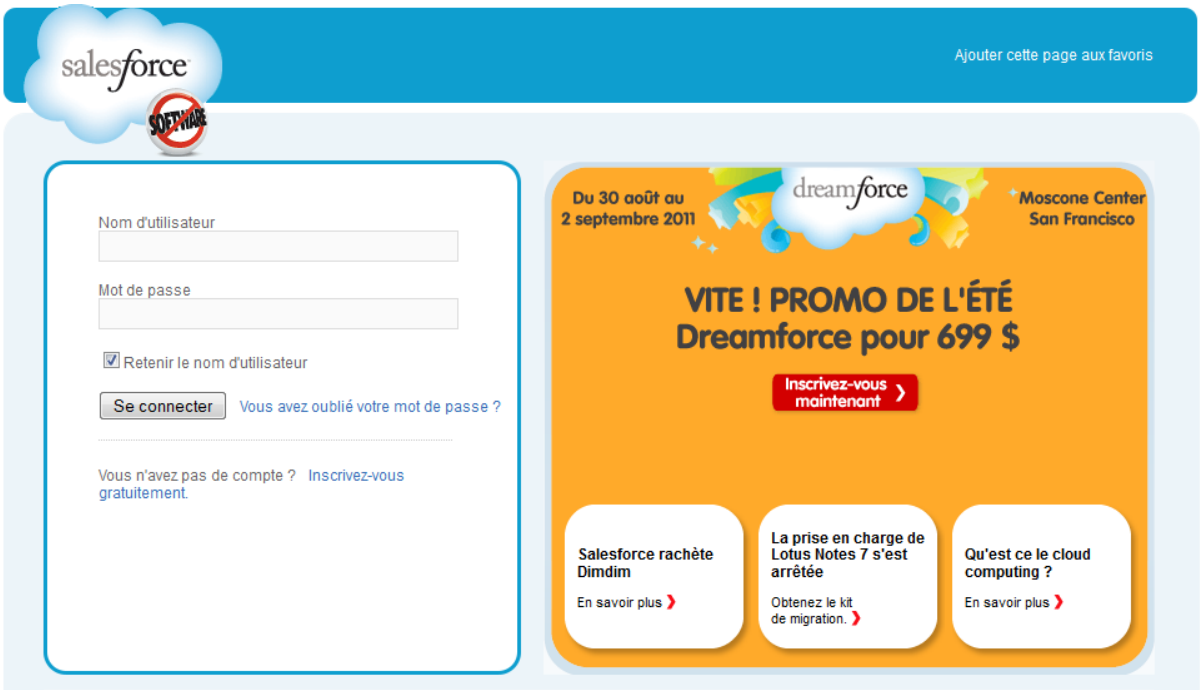
1. Installation connector

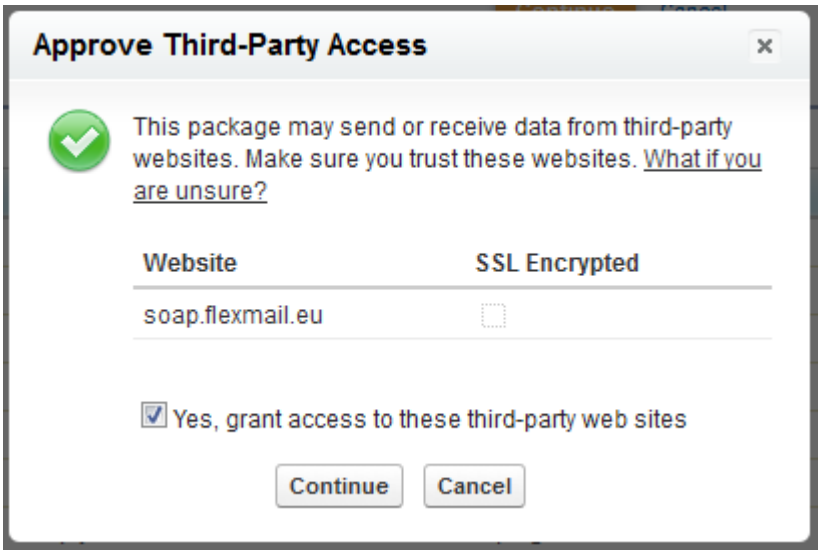
Click on the link below to install the Flexmail connector in your Salesforce account.

https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000JdEZ

Before you can start the installation, you first need to sign in to your Salesforce account.

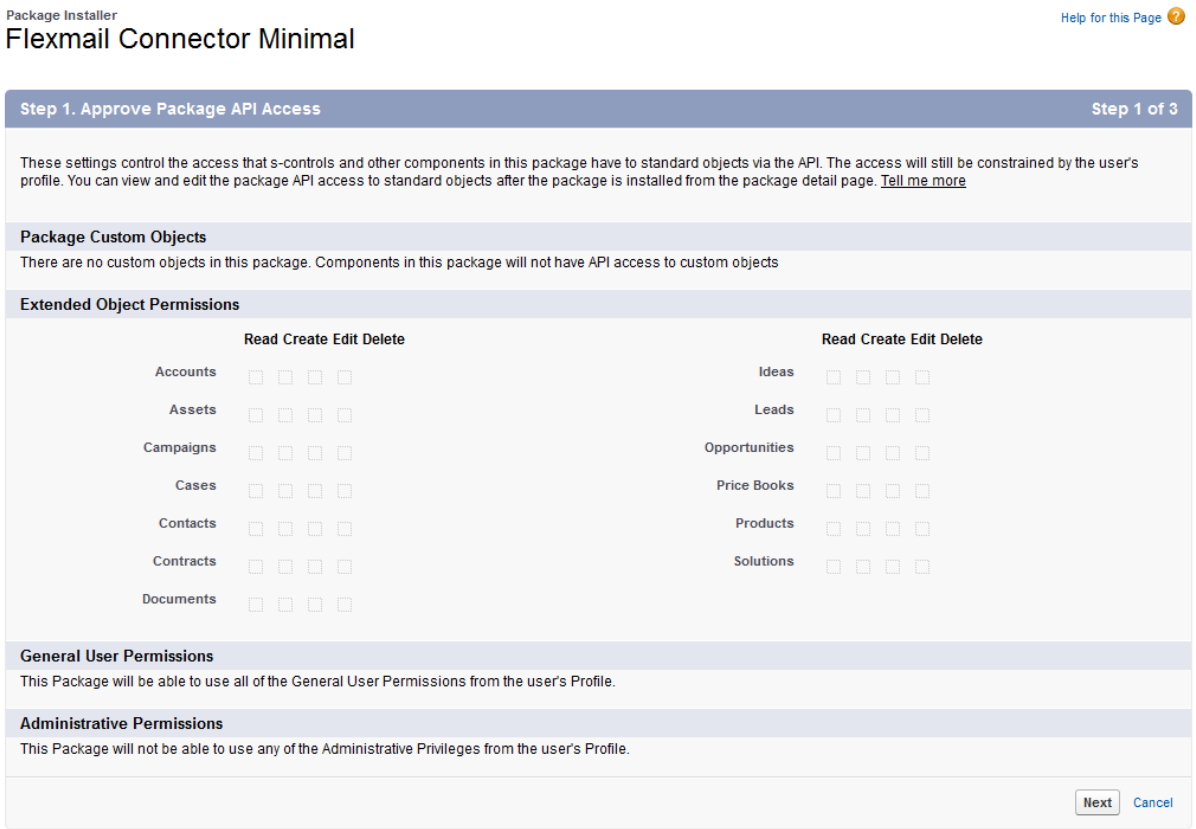

salesforce
Ajouter cette page aux favoris
Nom d'utilisateur
Mot de passe
Retenir le nom d'utilisateur
Se connecter
Vous avez oublié votre mot de passe ?
Vous n'avez pas de compte ? Inscrivez-vous gratuitement.
Du 30 août au 2 septembre 2011
dreamforce
Moscone Center San Francisco
VITE ! PROMO DE L'ÉTÉ
Dreamforce pour 699 $
Inscrivez-vous maintenant
Salesforce rachète Dimdim
En savoir plus
La prise en charge de Lotus Notes 7 s'est arrêtée
Obtenez le kit de migration.
Qu'est ce le cloud computing ?
En savoir plus

You will be asked to grant Flexmail access to your Salesforce account.

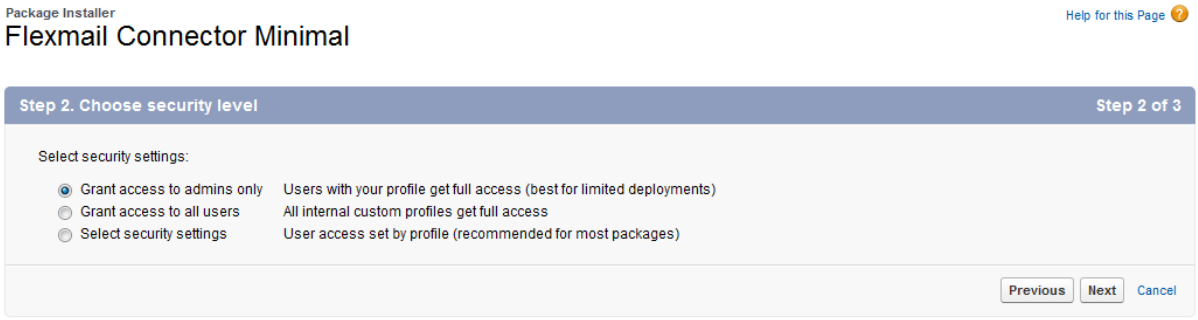

Approve Third-Party Access
This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?
Website
SSL Encrypted
soap.flexmail.eu
Yes, grant access to these third-party web sites
Continue
Cancel

Check the box “Yes, grant access to these third-party websites”.
Next, click “Continue”.

Step 1 of the installation gives you an overview of the rights that will be granted to Flexmail.
Click “Next” to continue.


Package Installer
Flexmail Connector Minimal
Help for this Page
Step 1. Approve Package API Access
Step 1 of 3
These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. Tell me more
Package Custom Objects
There are no custom objects in this package. Components in this package will not have API access to custom objects
Extended Object Permissions
Read Create Edit Delete
Accounts
Assets
Campaigns
Cases
Contacts
Contracts
Documents
Ideas
Leads
Opportunities
Price Books
Products
Solutions
General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.
Administrative Permissions
This Package will not be able to use any of the Administrative Privileges from the user's Profile.
Next
Cancel

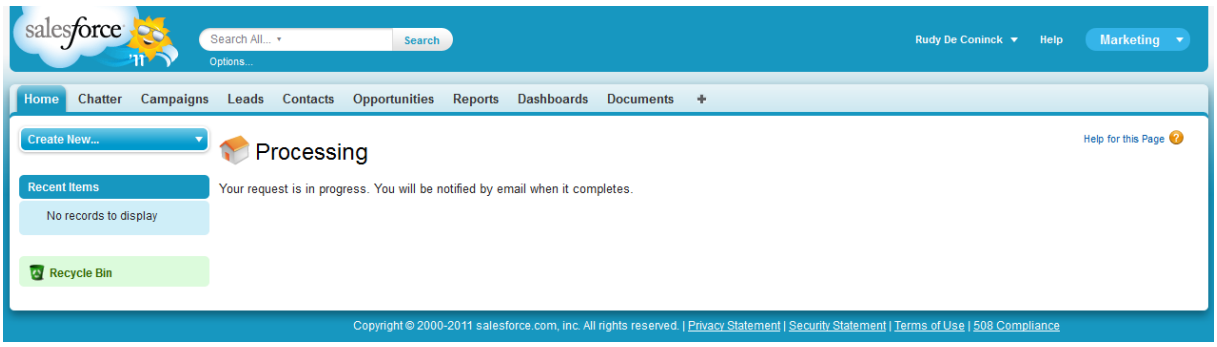
In step 2 of the installation, you can indicate which rights you'll grant to each user.
Click "Next to continue.


Package Installer
Flexmail Connector Minimal
Help for this Page
Step 2. Choose security level
Step 2 of 3
Select security settings:
Grant access to admins only
Users with your profile get full access (best for limited deployments)
Grant access to all users
All internal custom profiles get full access
Select security settings
User access set by profile (recommended for most packages)
Previous
Next
Cancel

In step 3, the connector will be installed.
Click on "Install" to start the installation.

Package Installer
Flexmail Connector Minimal
Help for this Page
Step 3. Install Package
Step 3 of 3
The package is ready to be installed. Click Install to continue.
Ignore Apex test failures that may cause the installed application not to function properly.
Previous
Install
Cancel

The installation has now started.
The installation can take several hours. You'll automatically receive an email after the installation is complete.



2. Configuration Connector

The Salesforce administrator needs to take the necessary steps in order to activate the connector.

Below you can find an overview of the Resources and Fields that were created during the installation of the connector.

▼ Resources (3)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Flexmail Create Mailing List	Campaign	Button or Link	This is a brand new component.
Create	Flexmail Create Campaign	Campaign	Button or Link	This is a brand new component.
Create	Flexmail Update Report	Campaign	Button or Link	This is a brand new component.

▼ Fields (26)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Ratio Bounced	Campaign	Custom Field	This is a brand new component.
Create	Total Unread	Campaign	Custom Field	This is a brand new component.
Create	Total Sent	Campaign	Custom Field	This is a brand new component.
Create	Campaign Language	Campaign	Custom Field	This is a brand new component.
Create	Ratio Unsubscribed	Campaign	Custom Field	This is a brand new component.
Create	Sender Email Address	Campaign	Custom Field	This is a brand new component.
Create	Reply Email Address	Campaign	Custom Field	This is a brand new component.
Create	Report Link	Campaign	Custom Field	This is a brand new component.
Create	Sender Name	Campaign	Custom Field	This is a brand new component.
Create	Flexmail Username	User	Custom Field	This is a brand new component.
Create	Total Unsubscribed	Campaign	Custom Field	This is a brand new component.
Create	Languages	Lead	Custom Field	This is a brand new component.
Create	Total Delivered	Campaign	Custom Field	This is a brand new component.
Create	Total Read	Campaign	Custom Field	This is a brand new component.
Create	Profile Updated	Campaign	Custom Field	This is a brand new component.
Create	Flexmail UserId	User	Custom Field	This is a brand new component.
Create	Total Bounced	Campaign	Custom Field	This is a brand new component.
Create	Flexmail Password	User	Custom Field	This is a brand new component.
Create	Languages	Contact	Custom Field	This is a brand new component.
Create	Flemail UserToken	User	Custom Field	This is a brand new component.
Create	Birthdate	Lead	Custom Field	This is a brand new component.
Create	Campaign Subject	Campaign	Custom Field	This is a brand new component.
Create	Ratio Read	Campaign	Custom Field	This is a brand new component.
Create	Ratio Clicked	Campaign	Custom Field	This is a brand new component.
Create	Total Clicked	Campaign	Custom Field	This is a brand new component.
Create	Ratio Delivered	Campaign	Custom Field	This is a brand new component.

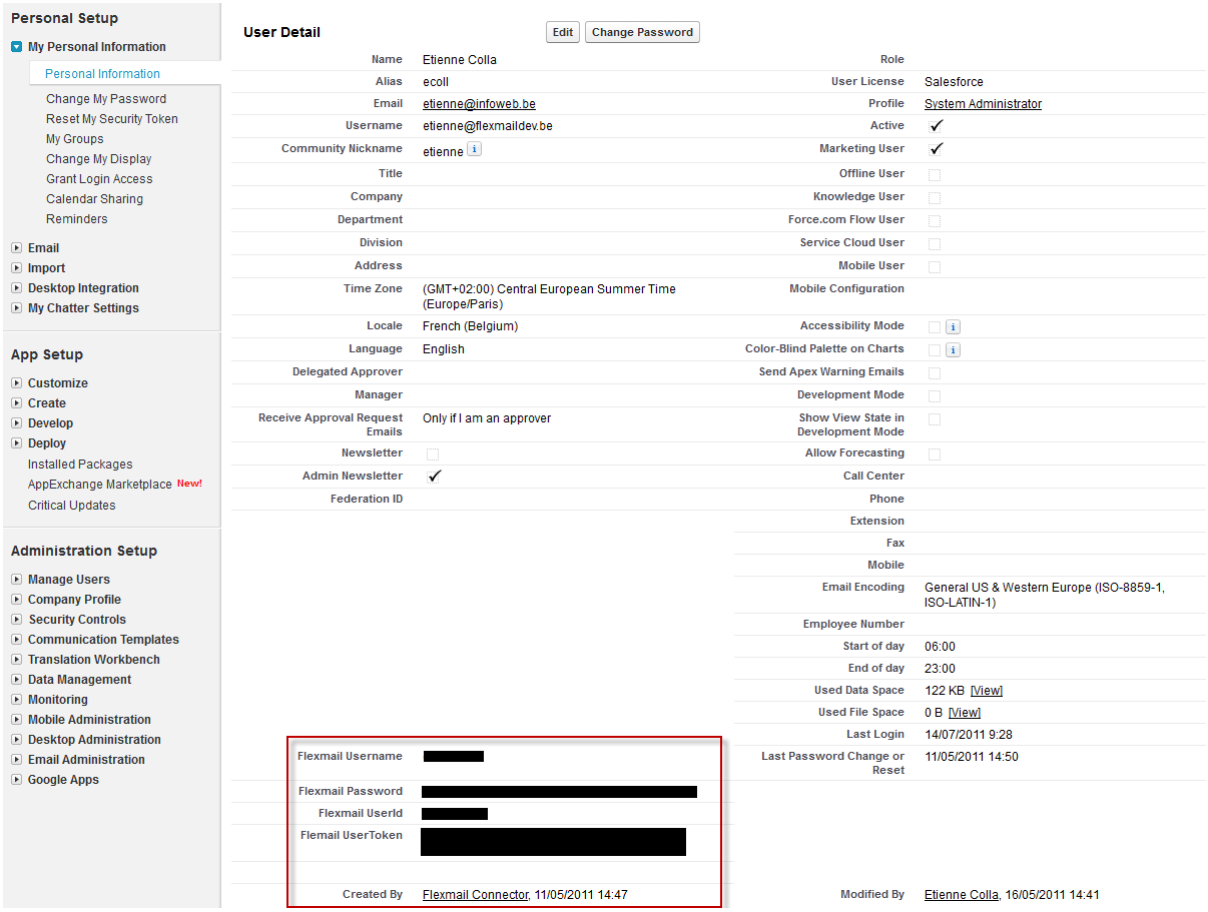
2.1. Connection with Flexmail

To create a connection between Salesforce and Flexmail, you'll receive 4 parameters from Flexmail:

Parameter	*Component name*	*Parent Object*
User ID	Flexmail Userid	User
Name user	Flexmail Username	User
Password user Salesforce	Flexmail Password	User
User Token	Flexmail UserToken	User

These fields need to be activated by the administrator on the following screen:

Setup / My Personal Information / Personal information

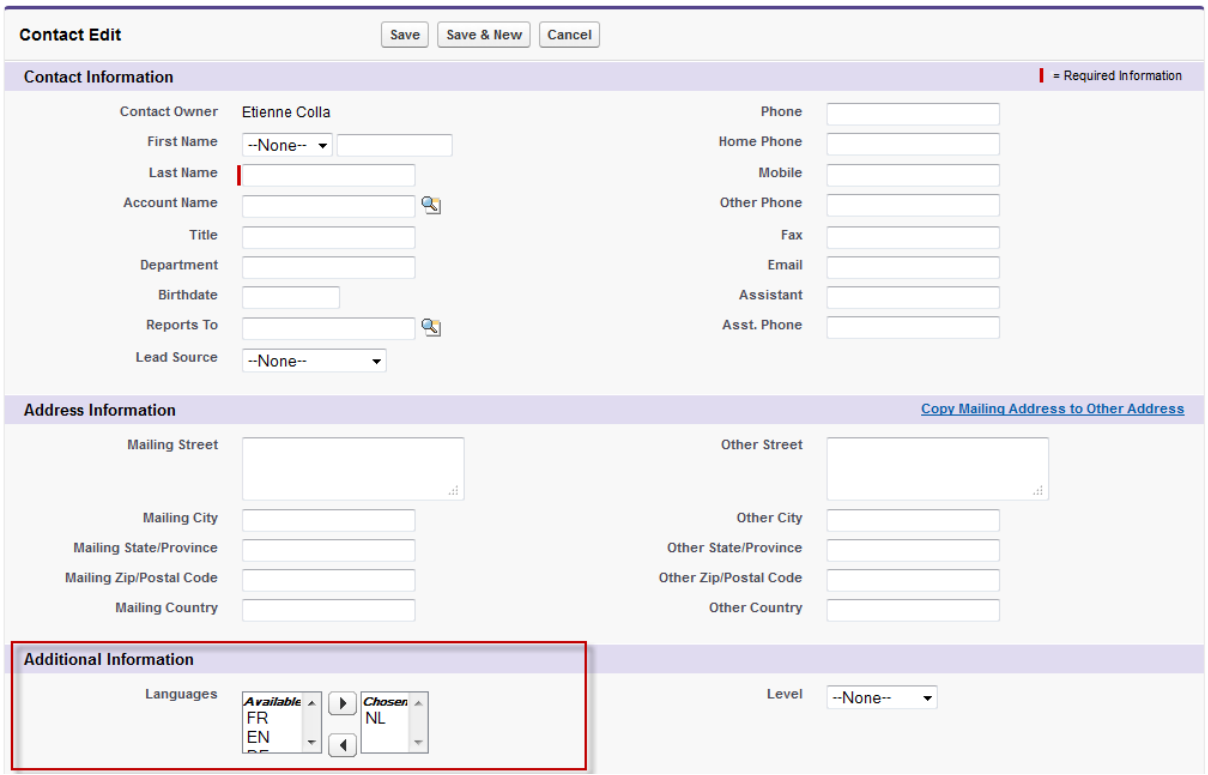


2.2. Extension of the “Contacts” and “Leads” in Salesforce

The administrator reeds to activate the additional fields for both the contacts, as well as the leads:

Contacts:

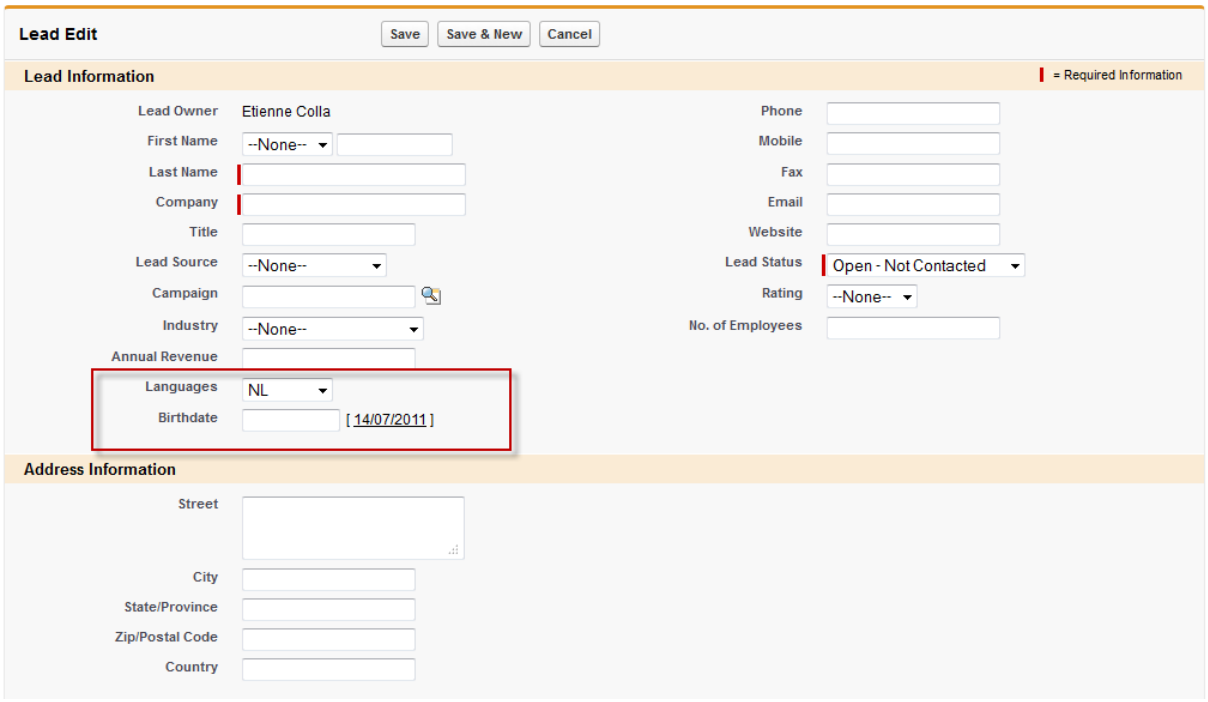
Parameter	*Component name*	*Parent object*
Languages	Languages	Contact



The position of the additional fields and the object type (dropdown or multi-select) that are used can be chosen by the administrator.

Leads:

Parameter	*Component name*	*Parent object*
Languages	Languages	Lead
Birthdate	Birthdate	Lead



2.3. Extension of the object “Campaigns” in Salesforce

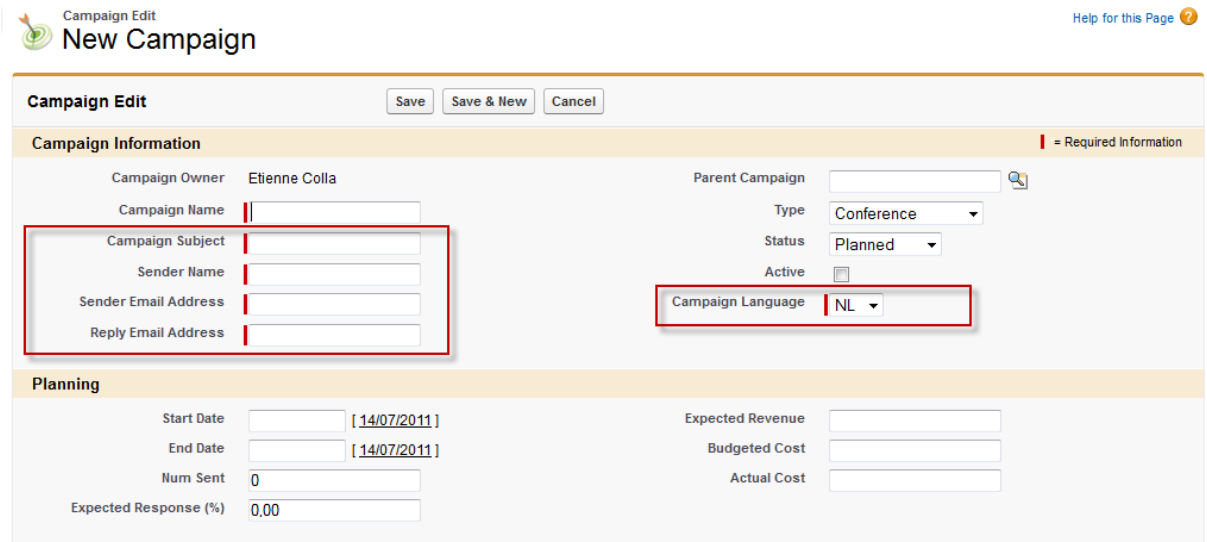
The extensions that are required in this section consist of 2 parts:

1. Parameters of a campaign
2. Statistics

Below you can find an overview of the available fields:

2.3.1. Parameters of a campaign

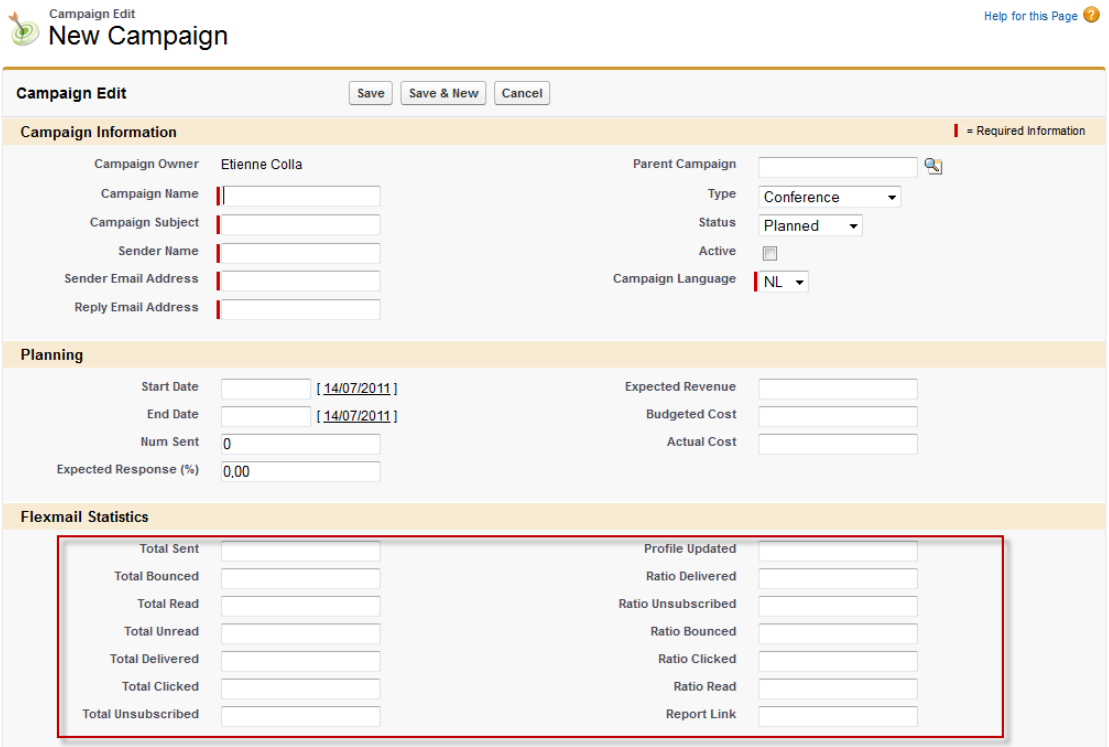
Component name	*Parent object*
Campaign Subject	Campaign
Sender Name	Campaign
Sender Email Address	Campaign
Reply Email Address	Campaign
Campaign Language	Campaign



These 5 fields are required fields.

2.3.2. Statistics

Component name	*Parent object*
Total Sent	Campaign
Total Delivered	Campaign
Total Bounced	Campaign
Total Read	Campaign
Total Clicked	Campaign
Total Unread	Campaign
Total Unsubscribed	Campaign
Profile Updated	Campaign
Report Link	Campaign
Ratio Delivered	Campaign
Ratio Read	Campaign
Ratio Clicked	Campaign
Ratio Bounced	Campaign
Ratio Unsubscribed	Campaign



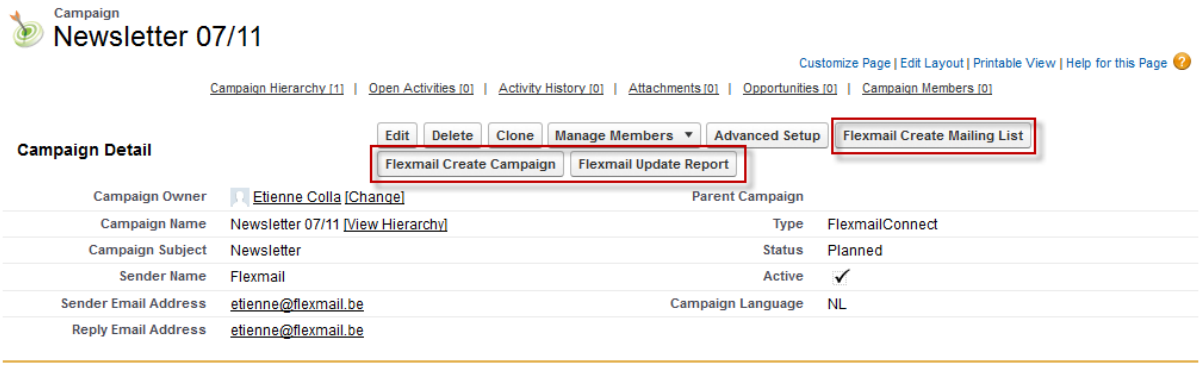
2.4. Integration of Flexmail Resources

During the installation, 3 new “Resources” have also been created.

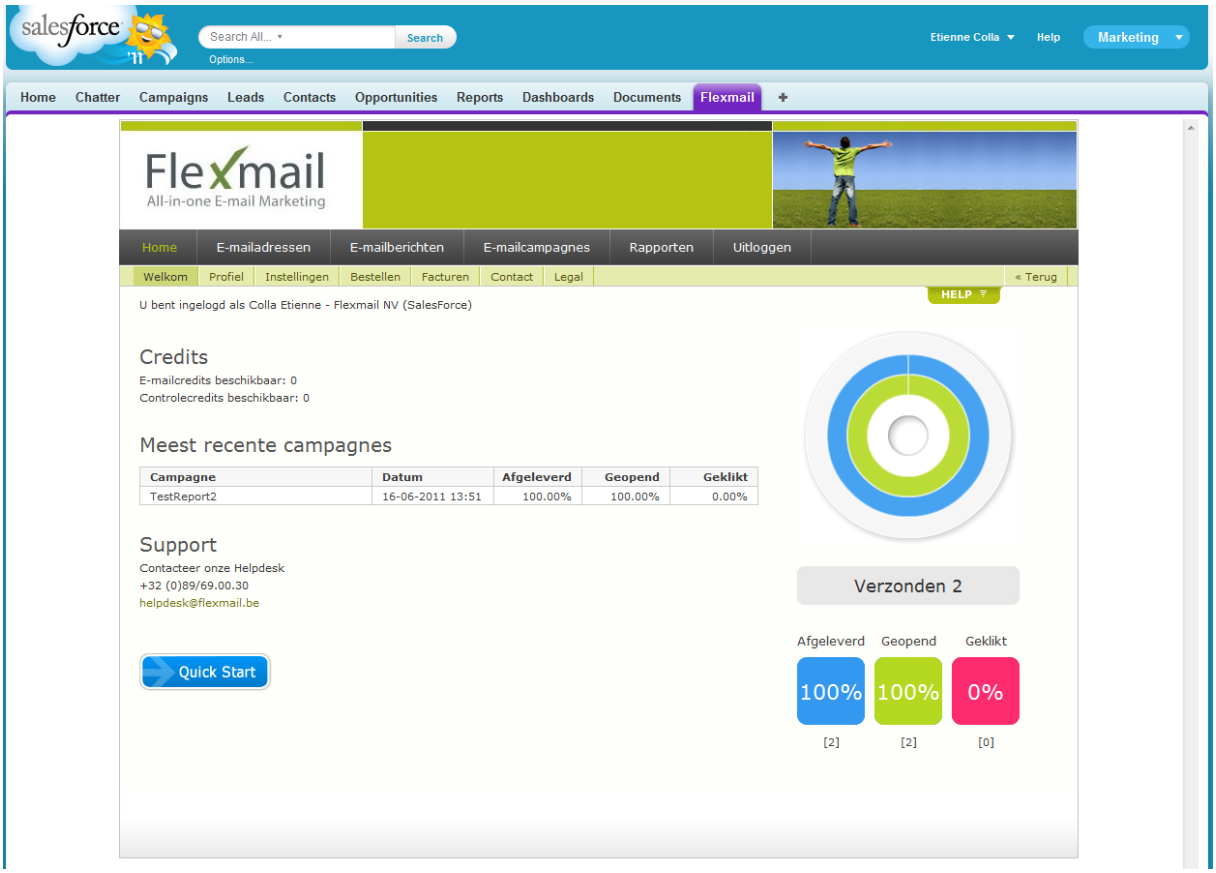
Component Name	*Parent Object*	*Component Type*
Flexmail Create Mailing List	Campaign	Button
Flexmail Create Campaign	Campaign	Button
Flexmail Update Report	Campaign	Button

The administrator can activate one or more resources in Flexmail by integrating new tabs in the menu.

Below you can see an example of how these buttons can be implemented.



2.5. Creation of a Flexmail menu tab



Create an additional tab in the Salesforce Marketing main menu.

Use the link below to connect to the Flexmail application and fill it in with your own data. This link will automatically login to Flexmail.

http://www.flexmail.eu/dyn/loginApp?username={!User.Flexmail_username__c}&password={!User.Flexmail_password__c}

Edit Web Tab

Flexmail

Help for this Page

Step 1. Choose Tab Layout — Step 1 of 3

Choose the page layout of the web tab you wish to create.

Full page width

Full page style gives you maximum screen real estate for the content you embed in the salesforce.com window

2 columns with salesforce.com sidebar

2 column style provides useful salesforce.com functions, like Search and Recent Items, on the same page as your emedded content.

Next Cancel

Edit Web Tab

Flexmail

Help for this Page

Step 2. Define Content and Display Properties — Step 2 of 3

Fill in information about the web tab.

Display Properties

Tab Label: Flexmail (1)

Tab Name: Flexmail

Tab Style: Mail (2)

Content Frame Height (pixels): 800 (3)

Mobile Ready: What Is This?

Splash Page

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Description

Description

Previous Next Cancel

Edit Web Tab

Flexmail

Help for this Page

Step 3. Enter the URL Details — **Step 3 of 3**

Enter the web page address in the Link URL field. You can enter a simple URL just as it appears in the browser address bar, or you can use one or more merge fields to insert organization-specific data from salesforce.com into URL parameters.

Examples:

Simple	http://www.google.com
With Merge Field	http://www.google.com/search?q={!Org_Name}

Available Merge Fields

Available Merge Fields
Select Field Type
Organization Fields
Select Field

Copy Merge Field Value

Copy and paste the merge field value into your template below.

Button or Link URL — = Required Information

http://www.flexmail.eu/dyn/loginApp?username={!User.Flexmail_username__c}&password={!User.Flexmail_password__c}

Preview Web Tab

Encoding: Unicode (UTF-8)

Previous | Save | Cancel

3. Resources and working methods

With the connector, you can use 3 resources.

These resources can be operated with 2 different working methods.

Available resources:

Resource 1: Flexmail Create Mailing List

This resource creates a mailing list in Flexmail.

Resource 2: Flexmail Create Campaign

This resource creates a mailing list in Flexmail and launches the campaign from within Salesforce.

Resource 3: Flexmail Update Report

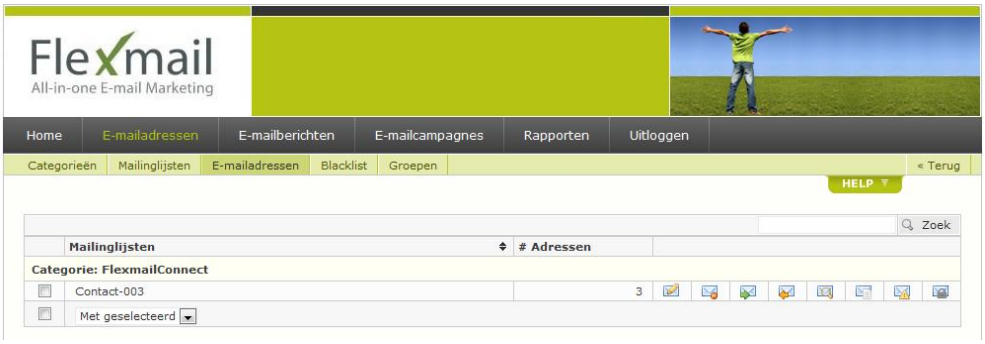
This resource will read out the statistics in Flexmail and save them in Salesforce.

Working method 1:

We will only be creating mailing lists from within Salesforce based on selections of “Contacts” and “Leads in Salesforce.

For this we will use resource 1.

The email campaigns will be lanched from within Flexmail.



The name of the mailing list is always the name of the campaign in Salesforce.
The language of the mailing list is the language of the campaign in Salesforce.
If needed, the name of the mailing lists and the category can be changed afterwards in Flexmail.

Statistics will be requested from Flexmail and shown in Salesforce.

We use resource 3 for this.

Working method 2:

With this working method we choose to also launch the campaign from within Salesforce, besides just creating the mailing lists.

For this we use the resource “Create Campaigns”.

When we launch a campaign from within Salesforce, we first need to create a message in Flexmail. The name of the message needs to be the same as the name of the campaign in Salesforce. This way, the link between the message and the campaign will automatically be set.

Statistics from Flexmail can be shown in Salesforce.
For this we use resource 3.

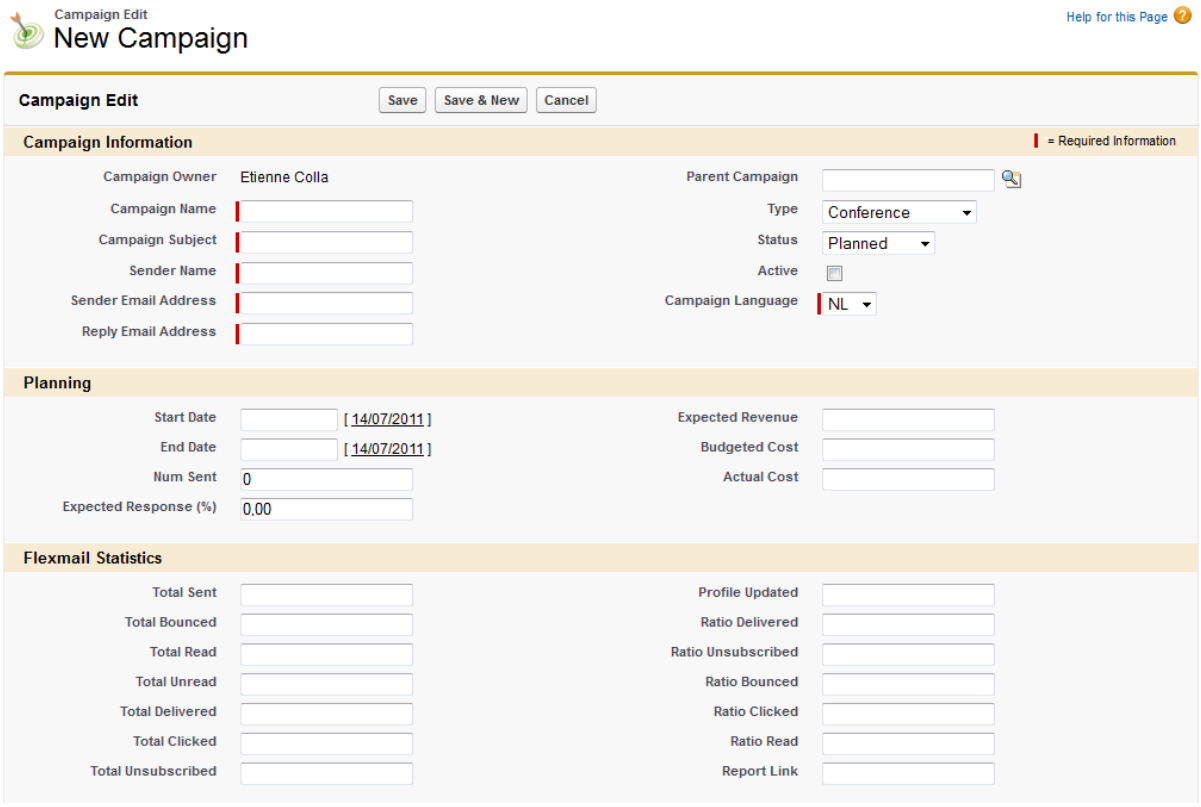
For both working methods, the user will keep having access to Flexmail. Each step can also be executed in Flexmail.

The statistics that are shown in Salesforce are a limited selection of the available report information in Flexmail. You can request additional reports for every campaign sent through Salesforce in Flexmail.

4. User manual

4.1. Working method 1

Choose the tab “Campaigns” from the main menu.



To create a mailing list in Flexmail, we first need to create a campaign in Salesforce.

The required fields for the creation of a mailing list are:

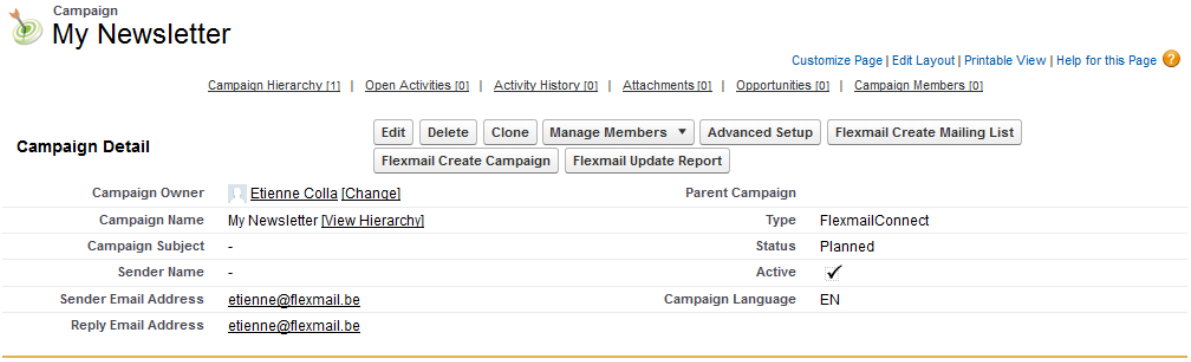
- Campaign Name
- Campaign Lanuage
- Type

The language of the campaign will also determine the language of the mailing list.
Select the desired Type . (category in Flexmail)
The administrator can create additional types. E.g. ConnectorFlexmail

Check the box “Active”.

Other required fields are not crucial and can be excluded from the list by the administrator.

Click the button “Save” to create the campaign in Salesforce.



The campaign has now been created and the button “Flexmail Create MailingList” now appears at the top of the screen.

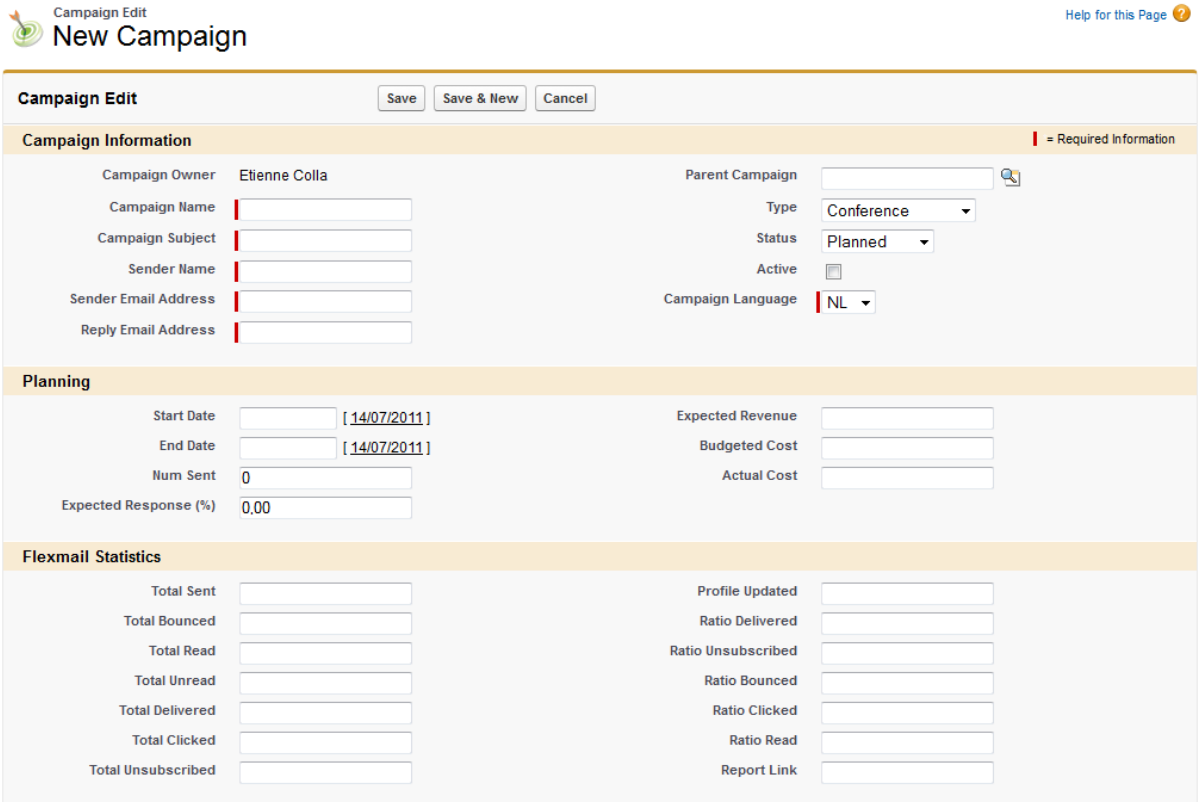
Next, the wanted “Contacts” and “Leads” need to be selected via “Manage members”.

Click on the button “Flexmail Create Mailing List”.

A mailing list will be created in Flexmail with the name of the campaign in Salesforce.

4.2. Working method 2

Choose the tab “Campaigns” from the main menu.



The required fields for the creation of a mailing list are:

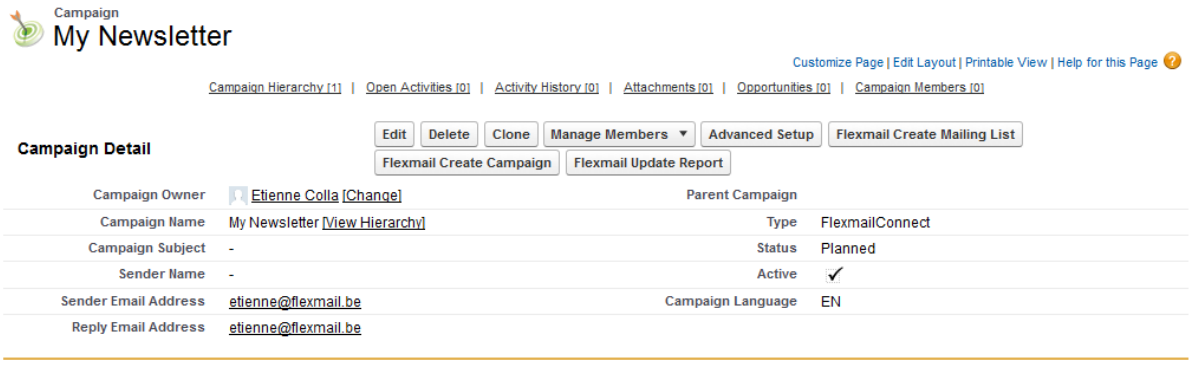
- Campaign Name
- Campaign Subject
- Sender Name
- Sender Email Address
- Reply Email Address
- Campaign Lanuage
- Type

The language of the campaign will also determine the language of the mailing list.
Select the desired Type . (category in Flexmail)
The administrator can create additional types. E.g. ConnectorFlexmail

Check the box “Active”.

Click on the “Save” button to create the campaign in Salesforce.

Warning: Before you can save the campaign you first need to create an email message in Flexmail with the same name as the campaign in Salesforce.



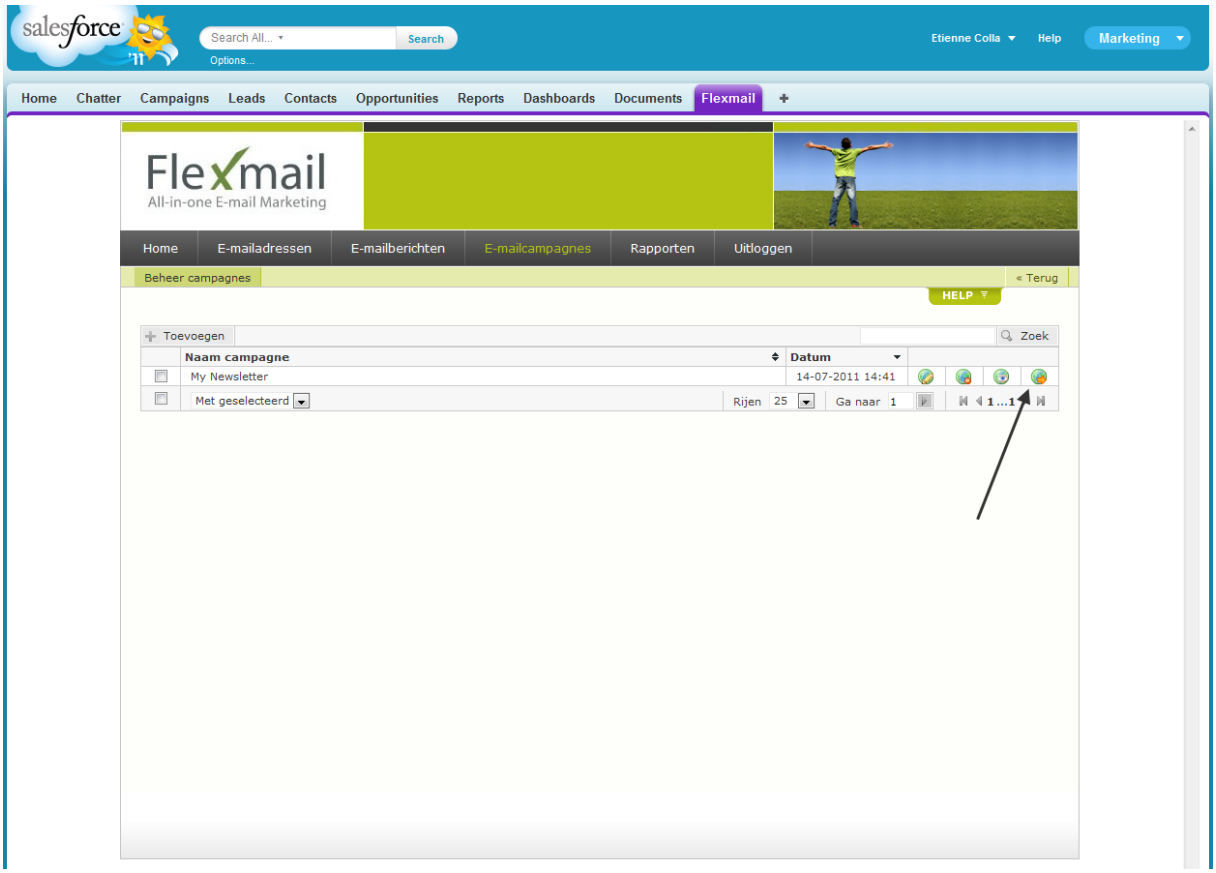
The campaign has now been created and the button “Flexmail Create Campaign” will appear at the top of the screen.

Next, you need to select the wanted “Contacts” and “Leads” via “Manage members”.

Click on the “Flexmail Create Campaign” button.

A mailing list will be created in Flexmail with the name of the campaign in Salesforce. An email campaign will also be created in Flexmail with the same name as the campaign in Salesforce.

Everything is now ready for sending.
Go to “Email campaigns” in Flexmail and choose the icon “Send email campaign” next to the concerning campaign.



You now have the option to send the campaign immediately or the plan the sending on a different time.

4.3. Updating statistics

As soon as the campaign has been sent, the statistics can be requested in Salesforce.

Click on the “Flexmail Update Report” button to request the most recent statistics.

These statistics will be saved in Salesforce.